

**Meeting 36 Summary**  
**Improving Outcomes for All Kids:**  
**MTSS, A Coherent and Integrated Systems Approach**

June 18–19, 2018  
Sanger, California

Prepared by Joel Knudson, American Institutes for Research<sup>1</sup>

---

***Note:** This meeting summary was developed as a resource for members of the California Collaborative on District Reform. We are making this document publicly available in an effort to share the work of the Collaborative more broadly to inform dialogue and decisions of educators throughout the state. This summary does not, however, contain the background and contextual information that might otherwise accompany a product created for the general public. For more information about the meeting and other Collaborative activities, please visit [www.cacollaborative.org](http://www.cacollaborative.org).*

The 36th meeting of the California Collaborative on District Reform tied together multiple threads of the group’s ongoing work. The 2-day convening explored the three themes that emerged from the Collaborative’s June 2017 meeting as areas of priority and focus: ensuring attention to equity, addressing educator capacity needs, and approaching the quest for improved student outcomes through a lens of continuous improvement. The conversation in Sanger also continued the Collaborative’s regular attention to issues of system coherence. Finally, the meeting enabled participants to revisit the topic of special education—especially universal design for learning (UDL)—first introduced at a June 2013 Collaborative meeting in San Francisco. Uniting all these ideas was the focus on multi-tiered systems of support (MTSS) as implemented in Sanger Unified School District USD to weave together and create a framework for multiple dimensions of improving student learning.

### **MTSS in Sanger**

Throughout the meeting, participants had an opportunity to learn about the multiple components of Sanger’s MTSS work, the underlying principles that guide it, and the process through which the district has developed and grown its approach.

---

<sup>1</sup> Thanks to Marina Castro, Linda Choi, Kathleen Jones, and CoCo Massengale for taking careful notes during the meeting and thus making this summary possible.

## ***A Strong Foundation***

As it set out to develop its MTSS, Sanger built on a strong foundation of effective systemwide education improvement strategies and practices.<sup>2</sup> For years, the district anchored its work in three practices: the use of professional learning communities (PLCs) as vehicles for building teacher and administrator capacity while pursuing quality and equity across classrooms and schools, a common language and practice of teaching and learning through explicit direct instruction (EDI), and a system of interventions and supports for struggling students that followed the principles of response to intervention (RTI). Through these efforts, Sanger developed common expectations and high standards that contributed to coherence across the district. Through focused and unwavering attention on student learning through each of the three vehicles, the district also created what one meeting participant described as a “culture of knowing students.”

## ***Changes in the California Education Landscape***

Despite its strong foundation, Sanger district leaders confronted an evolving education landscape in California that forced a them to reflect on their approach. First among the changes was a set of new academic standards and a realization that EDI would not be sufficient to meet the elevated demands of the Common Core State Standards. During this time, a June 2013 Collaborative meeting in San Francisco introduced the district to UDL, its roots in special education, and the ways in which it enables teachers to address their students’ diverse strengths as well as learning needs. Sanger sent teams of educators to Boston to learn more, and based on their enthusiastic experiences, eventually the district began a set of pilots to integrate UDL into its classrooms.

A deeper understanding of special education also pushed Sanger to reconsider its work. A state special education task force—motivated by the same June 2013 Collaborative meeting—considered the literature on best practices in special education and advocated for UDL and MTSS as the core of an approach to serving students with disabilities. Acknowledging the district’s longstanding attention to RTI, a Sanger district leader explained that MTSS is more than RTI: “It’s a tiered umbrella of supports.”

Sanger district leaders also responded to stakeholder pressure. With the implementation of the Local Control Funding Formula (LCFF), state regulations called for stakeholder engagement in the district’s strategic planning and resource allocation process. As Sanger leaders engaged in a process of reflection internally, they also confronted stakeholders eager to have a seat at the table.

---

<sup>2</sup> The Collaborative previously explored Sanger’s approach to improvement through a November 2010 meeting focused on its use of professional learning communities (<https://cacollaborative.org/meetings/meeting14>) and through a December 2014 meeting that examined implementation of the Common Core State Standards in mathematics (<https://cacollaborative.org/meetings/meeting26>).

### ***Alignment with Existing Approaches***

Given the changes they faced and the promises they saw in MTSS and UDL, Sanger district leaders decided to embrace both as vehicles to anchor their improvement efforts and adapt to new expectations and pressures. As they did so, these leaders set out to design an MTSS that fit in with the district's existing strategies and culture.

#### ***Mapping the Existing Reality***

District leaders began by mapping the elements of an MTSS that were already in place. They identified the components of what would qualify as Tier 1 supports—the base instructional and behavioral programs—then did the same for the differentiated supports the district provided to struggling students (Tier 2) and the intensive interventions offered to students with more severe needs (Tier 3). They also sought to determine the data that educators were using to determine whether a given strategy or a collection of strategies were effective. Finally, central office leaders examined how much money they were spending on each piece. The information gathered from this exploration guided decisions about what to continue, what to change, what to add, and what to end.

#### ***Anchoring New Efforts to Existing Systems***

Armed with information about what they were already doing, Sanger leaders set out to anchor the district's new work to exiting priorities and practices. First among these was the district's vision: "All students will have the options to demonstrate what they learn and the opportunity to be successful and achieve their dreams." This north star of student success had long driven the work of Sanger educators, and district leaders wanted to ensure that this remained the case. Responding to the observation that standardized test scores and accountability pressures often influence decisions in districts and schools, one district leader explained the Sanger philosophy by saying, "If you focus on the vision, the achievement will come." In addition to the overall vision, Sanger chose to maintain its focus on three primary district goals: (1) raise achievement for all students, (2) close achievement gaps between subgroups of students, and (3) ensure a safe environment. Finally, district leaders doubled down on the PLCs that had become instrumental to building organizational culture and improving classroom instruction. "PLCs is such a foundation for who we are in Sanger, it would be foolish not to work within our PLC teams," one district leader explained, "so we leveraged that."

#### ***Implementing the Sanger MTSS***

To embed MTSS into the district, Sanger leaders launched a 3-year implementation plan beginning in fall 2016. Year 1 (2016–17) saw the establishment of the district MTSS data team, which is a cross-functional group of central office leaders who meet monthly to review data and determine actions steps. Each school also created an MTSS team charged with reviewing student data and determining the appropriate supports to provide to students and teachers to address both individual and shared needs. Guiding these efforts, a district data calendar identified the priority metrics for review each month. In Year 2 (2017–18), district leaders asked sites to look at their tiered supports and find ways to improve the alignment of services with site-level allocation of resources. District leaders

reported that at this point in the implementation process, the combined focus on academic, social, and emotional needs came more naturally in elementary schools, in which teachers have historically embraced a focus on the whole child. The transition at the secondary level, in contrast, has been more difficult. Looking ahead to Year 3 (2018–19), Sanger will pivot its attention to engaging stakeholders more intentionally in the design and implementation of the MTSS.

### ***Components of the Sanger MTSS***

The entire MTSS in Sanger rests on a philosophy of early intervention. District leaders asserted throughout the meeting that the best intervention for students is proactively developing a strong base program. Educators often use a pyramid to visually represent an MTSS: The first tier of the pyramid, the base, represents the instructional program available to all students. The second tier, the middle, includes additional supports offered to the subset of students for whom Tier 1 is not sufficient to experience success. The third tier, the top of the pyramid, features intensive interventions offered to a small percentage of students who continue to struggle even after receiving additional interventions. The entire orientation of MTSS rests on the assumption of a thick base to the pyramid; for districts to efficiently allocate resources toward interventions, most students need to fall into the base of the pyramid, to have their needs met through Tier 1 supports. Too often, however, districts find that their pyramid is inverted: A small percentage of students thrive under the base program and most require additional supports. A Sanger district leader explained the central office’s realization of this problem and the way they needed to redesign their strategy in response: “We couldn’t reverse the inversion of our pyramid unless we addressed that our Tier 1 was not universally accessible.”

Sanger’s MTSS deliberately creates a structure for all students to experience success. They have found that their approach, however, is especially strong in serving students with disabilities. Traditionally, and in most districts today, schools convene a student study team (SST) to examine a student’s academic, behavioral, and social-emotional progress for a student who struggles. In cases where a special education evaluation leads to a diagnosis of disability, an individualized education plan (IEP) articulates the supports that a student with disabilities will receive. In contrast, the systems of monitoring and support that compose Sanger’s MTSS mean that the SST and IEP are no longer the only ways to help struggling students. The SST was once a mechanism employed when a student was failing academically, but as one Sanger administrator explained, “Now, because we have so many things in place, we don’t have to do an SST because we can quickly put students in the sorts of interventions they need.” By directly addressing student needs independently of the SST and IEP processes, the district can foster a more inclusive and integrated educational experience that maintains high levels of rigor. According to a district leader, “In the past, IEPs have been accommodations to make the work easier instead of utilizing a design system that gives students access to rigorous content.” This year, roughly 8% of Sanger’s students were designated as students with disabilities, compared with a 12% rate statewide. With fewer special education students, special education teachers and psychologists are free to spend more time in mainstream classrooms supporting Tier 1 instruction.

The following paragraphs describe each tier of the Sanger MTSS, then explore the data sources and processes for using data as part of the system.

### *Tier 1: UDL as a Lens for Instruction for All*

Tier 1, the base program in Sanger, centers on UDL as a philosophy for approaching instruction. According to one district leader, “This is the lens we want you to have when you walk into Sanger Unified.”

*Why UDL?* After an initial introduction at the June 2013 Collaborative meeting and subsequent learning opportunities in Boston, Massachusetts, Sanger district leaders selected UDL as their foundational approach to instruction for several reasons. First, it aligned to all three district goals. The universal nature of its differentiated instructional model focuses on all students, while at the same time intervening without waiting for students to fail helps to address achievement gaps among students. District leaders also suggested that the focus on engagement in UDL makes the classroom a place where students want to be, which they asserted is the first step to creating a safe environment. The district also found that UDL aligned to a range of other federal and state expectations for how they approach educational improvement, including those in the Every Student Succeeds Act, the frameworks for the Common Core and the Next Generation Science Standards, and other guidelines such as the state’s preschool framework.

*What is UDL?* UDL builds on what scientists have learned about how the brain operates to create learning environments that support all students. UDL recognizes that each brain functions differently and therefore promotes strategies to respond to individual variation along three dimensions. Teachers operating through a UDL lens need to provide **multiple means of engagement**, including options for recruiting interest, sustaining effort and persistence, and self-regulating. Teachers should also provide **multiple means of representation**, customizing and sharing information through a variety of formats. Finally, teachers following UDL guidelines need to provide **multiple means of action and expression**, including options for physical action, expression and communication, and executive function. Summarizing the elements of UDL, a district leader observed, “Engagement really needs to bleed into all of this.”

To help meeting participants understand the principles of UDL, a Sanger educator provided the example of asking students to compare and contrast the evolution of two characters in a story. The task is common in language arts classrooms. Traditionally, teachers ask students to demonstrate their learning through writing. A student who struggles with writing but understands the principle of comparing and contrasting might not have the tools to effectively respond to this prompt. At the same time, the teacher may be unable to distinguish among students who have achieved content mastery and those who have developed writing mastery. UDL is about opening options. In this case, a teacher working through a UDL lens may give students an opportunity to use their voice or leverage technology to complete the compare-and-contrast task. Later, once students have answered the question about comparing and contrasting for the teacher, the teacher can explore the issue with the students through writing if writing skills are part of the learning

objective. At that point, the teacher can build on the level of understanding a student has developed and expand from a place where the student has already experienced success.

Meeting participants noted that teaching effectively using UDL requires substantial teacher capacity. A teacher's choices in the classroom revolve around the question, "What is the goal?" An effective teacher needs to have the knowledge and skills to identify their goal and to select strategies that will help them achieve it. Teachers also need to understand the students in their classroom, including their strengths and weaknesses and the aspects of learning that motivate them. Addressing the engagement component that is critical to UDL success, a meeting participant observed, "If I don't know my kids, I can't answer the question of how to get them to care."

*How has Sanger implemented UDL?* Although UDL has its roots in special education, Sanger rolled out UDL through general education because of a strong belief that the approach is critical for *all* students. According to district leaders, UDL is the mechanism by which teachers better understand how to differentiate their instruction within Tier 1. And for UDL to succeed, teachers need to be knowledgeable about their craft, so the district has sought to carefully build teacher understanding and capacity. Although district representatives who visited Boston to learn about UDL were unanimous in their belief that it should drive instruction in Sanger, district leaders recognized that teachers were already overwhelmed by the introduction of new academic standards. They therefore waited until they felt that teachers had the bandwidth to understand and incorporate UDL.

The Sanger approach to implementing UDL has built on three pillars: pilots, choice, and PLCs. District leaders began their efforts with teachers most willing to embrace UDL, starting with 23 teachers representing 8 PLCs in their first year and expanding to 80 teachers representing 25 PLCs in their second. Because PLCs are the primary vehicle through which teachers plan and reflect on instruction, the district leveraged that organizational structure for introducing UDL. Each PLC selected one component of UDL as an area of focus for the year, which culminated in an end-of-year showcase in which they shared their approach with peers. At the meeting, participants had an opportunity to learn about these approaches through a mini-showcase from three sets of teachers, one apiece from the preschool, elementary, and high school levels.

Through its approach to the pilots, Sanger was able to use an existing component of its culture and instructional practice to start small with a new idea, providing enough agency for teachers to take ownership of the work. The parameters that district leaders set for the pilot also exemplified a balance between tight and loose expectations that are characteristic of Sanger's improvement philosophy. For the pilot PLCs, district leaders were clear that each team was to engage in site-based professional development, select an area of UDL for focus, identify key indicators of progress, share updates with staff, and provide evidence of growth. Teachers had flexibility, however, in the specific focus they chose for UDL and the way in which they rolled it out into their classroom and within their PLC.

Although UDL is the foundation of Tier 1 for Sanger, additional components of its base program focus specifically on social and emotional development, including Positive Behavioral Interventions and Supports (PBIS) and Second Step.

### *Tiers 2 and 3: Additional Academic and Behavioral Supports*

At each school site, an MTSS team meets monthly to review data and identify students who need additional support. (See the discussion of data use in the next subsection.) These conversations trigger Tier 2 and 3 interventions, and they intentionally combine academic and behavioral considerations in working with each student.

An elementary school team joined the meeting to describe what Tiers 2 and 3 look like at their site. From an academic perspective, elementary schools use a universal screener to assess reading proficiency and target students who score in the intensive range for reading intervention. These students go through an 8-week block of additional support from a Resource Specialist Program (RSP) teacher and an RSP aide, with weekly assessments administered to monitor progress. Students who make sufficient progress return to the general education classroom. Students who do not progress move on to Tier 3 supports, 45 minutes of daily intervention with an RSP teacher. Sanger district leaders expressed an aspiration to develop a similarly structured system of progress monitoring and supports for mathematics, which remains an area for continued growth.

The elementary team described a similar system of monitoring and triggers for behavioral interventions. Students who receive three behavioral referrals in a similar area qualify for Tier 2 supports, which are coordinated and designed with that student's classroom teacher or whoever is most strongly connected to the student. Examples might include a behavior plan or a check in/check out arrangement. Daily data on student behavior help school-based staff monitor progress. As with academic needs, students making progress exit the Tier 2 support system. Those who do not progress move on to more intensive Tier 3 supports, which can include counseling or support from outside services.

Because of the way that Sanger has created its systems of monitoring and support, the roles traditionally associated with special education have shifted. Sanger deploys its RSP teachers and psychologists to meet the needs of all students—those with and without disabilities. The approach is consistent with an overall district system in which educators evaluate and address the needs of all students together.

### *Data Monitoring to Inform Support and Improvement*

Identifying student needs and intervening at the appropriate level requires a strong system of monitoring student progress on a variety of dimensions. The district has therefore developed structures at all levels of the system to systematically collect and review data.

At the site level, multiple groups of educators—including PLCs, the MTSS team, and the principal's cabinet—review data on a regular basis to identify individual student needs and broader trends across students and classrooms. This review process informs the next steps for improvement, whether it be an individual support provided to a student with a specific

challenge or a professional development experience to address a schoolwide teacher capacity growth area. At the site level in particular, these reviews include both academic and behavioral indicators to better consider the needs of the whole child. For example, a school psychologist described a student in her school who struggles with reading and has anger management issues. Working with the MTSS team, the student’s teacher has developed a system of frontloading positive praise using a cup with gold coins that can help acknowledge good behavior while anticipating and mitigating disruptive reactions that can be triggered by academic challenges.

Two additional structures—the Sanger Academic Achievement Leadership Team and an administrator PLC—enable similar conversations to occur among administrators across schools. By reviewing data together, educators across sites can identify common challenges and share ideas for addressing school-specific needs.

Within the central office, a district MTSS data team meets monthly to review trends in key indicators according to the district’s data calendar. The team comprises leaders from multiple perspectives, including those with roles and expertise related to curriculum and instruction, parent engagement, data, and matters of discipline and restorative justice. The data calendar identifies metrics connected to California’s eight state priorities<sup>3</sup> and to the district’s Local Control Accountability Plan (LCAP) priorities. For example, the calendar in March calls for the team to review data on suspensions, expulsions, attendance, and English learner (EL) reclassification, as well as results from the Benchmark Assessment System (BAS), Dynamic Indicators of Basic Early Literacy Skills (DIBELS), and the District Progress Assessment (DPA). The conversation among team members revolves around a live dashboard in which participants can view each data element in real time, as well as make comparisons in results over months and across years. During the Collaborative meeting, members of the district MTSS data team engaged in a fishbowl conversation about the metrics from March that enabled meeting participants to observe how the team interacts and works together.

Given the centrality of data use to the effective implementation of an MTSS, Sanger continues to wrestle with how to review and work with data most effectively at each level of the system. To that end, the Sanger team posed a problem of practice for meeting participants to address in consultancy groups: “How do we efficiently and effectively use data to make meaningful actions to address state and local priorities?”

Underlying the Sanger problem of practice are two challenges. The first challenge is a tension between consistency and compliance. The district team needs a consistent set of data from each school to understand systemwide trends, yet it still wants to enable sites to determine the data points that most effectively inform their local needs. According to one district leader, “The MTSS team cannot talk about data if every school site is feeding them

---

<sup>3</sup> The LCAP guidelines require districts to describe their goals, strategies, and expenditures to address eight state priorities identified in LCFE statute: (1) basic conditions for learning, (2) implementation of state standards, (3) parental involvement, (4) pupil achievement, (5) pupil engagement, (6) school climate, (7) course access, and (8) other pupil outcomes.



different data...but that's created a system of compliance counter to what we're trying to accomplish." This individual continued, "How do we create alignment from PLCs to the board and still have them feel as if they have some autonomy over what they're looking at?"

The second challenge is making a high volume of data actionable. The district's data calendar seeks to ensure that every metric of importance receives some attention during the year, but the sheer volume of these data makes it difficult to understand, much less act upon, what district leaders learn. Compounding this challenge is one of timing. As part of their processes of continuous improvement, school-level teams routinely review and act upon data to address local needs. Sanger is still trying to navigate the district role in this process. A district leader explained, "The district inserted itself into the process. We analyze data, but we were way behind what the schools are analyzing. By the time we got the data, they had already done action.... How do we make ourselves a valuable part of the conversation?"

Lessons about data use—both from the consultancy and from other discussions throughout the meeting—appear later in the summary.

### *Stakeholder Input and MTSS*

As Sanger evolved to make its MTSS the backbone of its districtwide improvement efforts, its early experiences with soliciting stakeholder input posed challenges. Charged by LCFF statute to engage community members in the development of its LCAP, district leaders sought to gather opinions from parents and others through meetings and surveys. They soon discovered, however, that the same limited set of people kept showing up to events, and that the 6,000-plus survey responses they received were sometimes too overwhelming to process. At the same time, district leaders encountered tension between maintaining their focus on the district's core work and being responsive to stakeholder priorities—especially when those priorities did not neatly align with the work already underway.

A new approach in Sanger streamlines and focuses stakeholder engagement. Each year, the district assembles an LCAP Guidance Committee of 33 members, which comprises representatives of every group that is a beneficiary of LCFF dollars. The group meets seven times per year so that district leaders can educate and inform them about the LCAP, the district's ongoing work, and the resource allocation practices already underway. For example, members of the committee learn that Title I and other funding sources already go to support many EL-specific services. To help amass and prioritize stakeholder input, the district conducts several sessions with community members that feature a poker chip exercise in which participants make decisions about how to allocate \$200 in poker chips toward a range of district priorities. Through this exercise, committee members and district leaders can better understand the topics of greatest importance to the community.

The information gathered by the LCAP Guidance Committee combines with priorities articulated by the administrator PLC based on data trends to inform the district MTSS data team. Because the team already meets regularly to identify district needs and already features members from a variety of perspectives, this team is responsible for writing the

LCAP. In this way, Sanger seeks to honor and incorporate priorities from stakeholders in the community with an overall approach that is consistent with the district's strategic direction.

## **Themes About MTSS as a Vehicle for Improvement**

Across the 2 days of conversation, several themes emerged about employing MTSS as a vehicle for improvement, both from the Sanger context and from the insights and experiences of other participants in the meeting.

### ***Recognizing the Importance of a Strong Base Program***

Repeatedly throughout the meeting, Sanger representatives and other meeting participants emphasized that the best approach to intervention is a strong base program. When the system meets a student's needs, elaborate additional supports become unnecessary. A base program that features high levels of rigor and differentiates to meet the needs of individual students eliminates the need to intervene with many students. Moreover, early intervention frees systems to use resources more efficiently and effectively because the number of students requiring additional support diminishes. In Sanger, this means the more flexible use of psychologists and RSP teachers. Multiple districts described challenges resulting from a "flipped triangle," with extensive Tier 2 and 3 supports—often resource intensive and weakly aligned with one another—deployed to put out fires when Tier 1 did not work. A healthy MTSS relies on the bulk of students falling within the base of the pyramid, and a strong system there to support them.

### ***Designing the Change Process***

The Sanger experience and reflections from participants highlighted several considerations for designing the process of district change.

### ***Build on a Strong Foundation***

Leadership stability has been a key facilitating factor in continuing momentum in Sanger. When the district faced superintendent transitions in 2013 and 2018, the school board entrusted the position to an individual from within the system who understood the work already underway and committed to its ongoing growth and evolution. For districts with frequent turnover in senior leadership positions, in contrast, instability has been a source of challenge in developing and sustaining new ideas. In addition, Sanger leaders have consistently sought opportunities to leverage strong elements of district culture and practice in service of new ideas. For example, the district has introduced UDL through PLCs, which have long been the lynchpin of instructional improvement.

### ***Understand What Is Already in Place***

Acting with coherence calls for an integration with approaches that are already in place and sometimes requires moving away from strategies that are not consistent with those approaches. However, many change efforts layer new expectations on top of existing ones without sufficient attention to how they interact (or, in some cases, contradict each other). Sanger began its MTSS work by mapping what already existed in the district and

considering what aligned with its intended direction and what did not. Similarly, a leader from another district described lessons they have learned from a peer district that took a full year to visit every site, understand what was in place, and identify where things were failing before embarking on a new direction. With a clear understanding of what exists, district leaders can make informed decisions about what to maintain, what to change, and what to end in an effort to build on positive practices while embracing better ones.

### *Start Slow to Go Fast*

Sanger frequently embraces new initiatives by starting small with early adopters; participants from other districts similarly described the potential benefits of beginning new work with pilots. Approaching work in this way can leverage the contributions of those most excited about a new idea to test it and navigate some of the inevitable challenges that emerge. When early adopters experience excitement or success, it can also create momentum for change. Rather than merely complying with new directives from the central office, teachers see their colleagues trying something that improves their practice, which can ignite their interest to try it as well. The piloting process can take more time, which can be a source of frustration when student needs seem urgent, but it can enable districts to move forward much more effectively when they feel that the system is ready.

### *Create Buy-In and Ownership*

Meeting participants observed throughout the meetings the ways in which investment in Sanger's MTSS facilitated a positive implementation journey. According to these participants, engagement and choice help with buy-in. One individual commented, "We want to be careful because the teachers' attitude is so often, 'Here comes another thing.' But if they're part of the conversation, maybe it will stick." Another participant added, "The best people to drive this initiative are going to be the people who are doing the work.... They need to feel what it means to be honored and valued as a professional, to be given all the information and choose the best path."

Seeing results can also help with buy-in. As it relates to UDL, for example, providing students with options for how they access or present their learning can improve student engagement. According to one participant, "That piece helps the secondary teachers with buy-in: Hey, this will help your students be less of a management problem."

Participants also suggested that buy-in requires trust. To really embrace new ideas, teachers need to trust that those ideas are in their best interests and will help them as educators. Engagement and choice for teachers can help build that trust. A meeting participant offered this observation about the work in Sanger: "The message [that] you trust the people that work here is powerful. And believing in them helps them believe in students."

### ***Navigating a Balance of Loose/Tight***

One element of creating ownership within a district improvement effort is determining the balance between what is tight (that is, the non-negotiables around what needs to happen) and what is loose (that is, the elements around which educators can follow their

preferences and professional judgment). This loose/tight balance is a key component of Sanger's change management strategy, but it is also central to the district's approach overall. Leaders from Sanger described ways in which defining loose/tight helps the district achieve clarity and consistency. One individual explained, "By clarifying the tight, you're establishing coherence throughout the district. They know expectations are the same for me, same for their colleagues, and that relieves anxiety and allows everyone to see we're on pace and making process." A colleague added, "One thing that's nice about loose/tight is that it distills down what you actually want."

Several examples emerged during the meeting of how Sanger navigates loose/tight decisions. The district expects PLCs, for example, to meet weekly, to orient their PLC meetings around four key questions,<sup>4</sup> and to complete a data analysis sheet. The district is tight in those areas. Teachers have discretion about when to meet, for how long, in what format, and how to organize their data. Those areas are loose. As another example, as part of a push on early literacy, Sanger funded a literacy specialist at every site with the goal of improving literacy as measured by a third-grade assessment (tight). Each site had the discretion for how to use this position (loose). More specific to the meeting content, participants in the UDL pilots had to engage in professional development, work in PLCs, and prepare a showcase describing their work at the end of the school year (tight). Each teacher team, however, chose their own UDL area of focus and how they rolled it out in their PLC and their classrooms (loose).

Dialogue at the meeting raised some of the challenges with identifying the loose and tight in a district; several district leaders described navigating the balance as a key challenge for them. Participants also posed the question of how best to offer choice while still maintaining high expectations and ensuring an appropriate level of rigor. In some districts, defined—or earned—autonomy is an approach used to determine when expectations are tight or loose. According to one participant, "It has to be earned autonomy. Everyone loves autonomy without accountability, but you have to have more proximity to schools that are not getting results."

### ***Pursuing Multiple Dimensions of Coherence***

Throughout the meeting, participants also emphasized the importance of coherence in what Sanger does and in the success of many district improvement efforts. Coherence emerged in the conversation through multiple perspectives: within existing structures and processes, across initiatives, and across levels of the system.

Sanger educators have strategically sought to integrate efforts around UDL and its MTSS into existing structures and processes. In the words of one Sanger representative, the district is not stacking on new things; it is weaving them in. Introducing UDL through PLCs—a mechanism through which teachers already regularly discuss their approaches to classroom instruction—is one example of this approach. As one district leader explained,

---

<sup>4</sup> For many years, Sanger has required its PLCs to orient their work around these four questions: (1) What do we want our students to learn? (2) How will we know when they have learned it? (3) How will we respond when learning has not occurred? (4) How will we respond when learning has already occurred?

“We held onto the coherence and the goals and decided that we can’t make MTSS another new thing. It has to fit into what we’re doing.” Another meeting participant reflected, “I heard them leveraging existing successful structures to take new content and pouring it into the known.”

Meeting participants also discussed the importance of aligning various initiatives with one another. Comments during the meeting suggested that coherence among strategies requires breaking down silos among departments and programs. As one participant asserted, “Special education cannot do this alone. It has got to be core instruction, the general ed[ucation] teacher, the skills to reach all students on the margin, high achieving [and] low achieving.” Another participant argued that MTSS can be an approach that enables these connections: “I think what MTSS helps with is removing those silos.... We can’t have those conversations if we’re not sitting next to our special education teachers in professional development.” This kind of coherence is a challenge that other district leaders indicated frequently emerges for them, especially when teachers and principals perceive MTSS as yet another program to add to a list of things they need to do, or when silos exist among administrators focused on issues like academics, mental health, or physical health. One district leader explained, “All these different initiatives are living in different units and departments. When we are at school sites, what we hear from the principals is, ‘Help us make sense to integrate these programs and initiatives and it into our vision to direct our classrooms.’”

Coherence can also help bridge levels of the system, both connecting schools to one another and connecting everything from the classroom to the school to the central office to the school board. Common language and expectations throughout a school system can promote quality, consistency, and buy-in. This kind of coherence can help to build and maintain a strong district culture.

Participants also raised some of the challenges that can get in the way of coherence. Feelings of initiative overload, where MTSS becomes yet another program to add on, are a struggle experienced by many districts. Coherence may also require a willingness to take things away that do not fit with an overall district approach or are not working. Those kinds of changes often require clarity about what the district is trying to accomplish and courageous leadership to make the right changes.

### ***Measuring the Right Things in Order to Improve***

A system that relies on monitoring student performance and other measures of effectiveness to guide supports and interventions is one that uses data to inform a process of continuous improvement. In such a system, participants emphasized the need to have the right metrics and assessments to measure matters of importance to districts.

### ***Make Measurement and Analysis Decisions Based on their Purpose***

As districts explore the data they collect and examine, the purposes of the data matter. Using data for accountability purposes, for example, is different than using them for improvement. As districts continue adapting to the world of LCFF, the calls to articulate

plans and demonstrate progress toward all eight state priorities, combined with the measures called out in the California school dashboard, may have the unintended effect of pushing districts toward an accountability mindset. Meeting participants suggested that it may be important to anchor conversations about data in what the *district* has decided is important. Reflecting on struggles that the Sanger team is experiencing with prioritizing data, one individual observed, “I hear, ‘We only have three areas of focus [the district’s three goals],’ but also, ‘We will also focus on everything in LCAP [through the calendar of metrics that the MTSS data team reviews]’ at the same time.”

Different metrics may have more actionable uses to different members of a school system. Some data help inform decisions about how to serve students well. For teachers, this might mean information that can drive lesson planning and instruction. For principals, it could help in the design of professional learning and support. Other data help inform system improvement. At a district level, administrators might use data to design or deploy interventions, supports, or resources. For a school board, data might serve a more summative purpose: “Here is what we tried. Did it work?” More simply, one meeting participant suggested that educators should use data to inform four decisions—stop, start, keep, and fix—and then, for any given role, focus on the data that enable those decisions.

These reflections might inform district leaders as they navigate the balance between consistency in data collection and analysis across a district—which could have the unintended side effect of creating a compliance mentality—and local agency in selecting metrics appropriate to roles and the local context. Contributing to this discussion of balance, one meeting participant suggested that looking at data use through a UDL lens implies granting choice about which indicators to monitor.

### *Focus on the Right Outcomes*

Building on the recognition that the purposes of data matter, meeting participants also emphasized the importance of measuring the right outcomes. State guidance connected to the LCAP and California school dashboard can appear to dictate the outcomes that districts should examine, but it can also lead to an overwhelming amount of information. Focus can help. If districts target their attention on a small number of key outcomes—especially when those outcomes are leading, rather than trailing, indicators—then they can streamline their efforts while contributing to ripple effects toward other outcomes that matter. Participants also suggested that data collection and analysis take cost into account. In an environment with significant resource constraints, using data to inform decision making is not merely a question of effectiveness, but one of efficiency.

Participants mentioned several possible metrics that extend beyond those collected or required by the state. Common assessments, for example, can help frame and guide conversations and decisions about student progress. Rubrics can also play a role in helping teachers align expectations for student learning to their goals, rather than try to fit an existing square peg into a round hole. Rubrics might be especially useful when introducing something new—like UDL—into a district’s model for classroom instruction.

### *Provide, Access, and Use Data in Real Time*

If data are to inform a process of continuous improvement at any level in a school system, then those data need to be timely enough to act on what is actually happening in classrooms and schools. Data use too often focuses on lagging indicators, and when the state provides information, it frequently does so months after the fact. Leading indicators may be among the most critical because they enable educators to intervene and provide support before challenges escalate. Moreover, data collection practices and data systems that enable real-time access to key outcomes can facilitate more productive conversations about improvement. One aspect of the Sanger MTSS data team meetings that works well is the team's ability to access current data and, with the click of a button, to examine trends within and across years.

### *Make Data Meaningful*

Data—even the use of the term “data”—can prompt unease among educators who are not trained or experienced in its use. That discomfort often grows in environments where teachers and administrators associate data with high-stakes accountability. As district leaders seek to promote cultures of continuous improvement, they can help their cause by finding ways to make data meaningful to the educators who use it. Data are important because they help to paint a picture about instruction and student learning; districts may experience more success when they can help their employees paint that picture. As one meeting participant explained, “Data are getting a bad rap, but when you talk about it as a story and make it a conversation, then that protects the culture and climate.”

### ***Creating Opportunities for Professional Learning***

As districts embrace MTSS as a vehicle for improvement, participants highlighted the need for strong mechanisms of professional learning. Effective implementation will rest on the ability of adults in the system to understand and integrate key components into their professional practice. The foundational approach of Sanger's Tier 1 program, UDL, asks a lot of teachers, and they will need strong training and support to implement it well. PLCs can serve as a productive vehicle for this kind of growth, as they give teachers an opportunity to reflect and collaborate on their instructional practice. The ongoing processes of data review and professional discussion will also reveal areas of shared challenge across a grade level or throughout a school. Site-based professional development can help principals address these shared struggles in the service of progress.

### **MTSS and State Policy**

The meeting concluded with a panel discussion that addressed connections between MTSS and state policy, including implications that emerge from the Sanger experience and that of other participants at the meeting.

### ***Reframing Conversations about Special Education***

The Sanger approach to MTSS highlights a need to reframe conversations about special education. Although MTSS and UDL both emerge from the field of special education, Sanger has deliberately applied them to meet the needs of all students in the district. In doing so,

the district has seen a reduction in special education identification rates, a change it attributes to recognizing and addressing student needs through a strong base program. Reflecting on this philosophy, one meeting participant celebrated this approach and observed, “The problem is a general education problem, not a special education problem.” The tone and language around special education funding, however, are problematic. Educators often use the word encroachment, for example, to describe the application of people and other resources toward students with special needs relative to general education students. As one meeting participant explained, the word “creates a light around special education and special educators as something like a thief in the night that takes something that doesn’t belong to them.” This individual continued with the reminder, “You’re a general education student first.”

### ***Revisiting Special Education Funding***

Beyond the rhetoric around special education, flaws in funding for special education also require attention. The state charges Special Education Local Plan Areas (SELPA) with facilitating high-quality educational programs and services for students with disabilities, yet meeting participants’ experiences suggest that the model is both opaque and inefficient. According to one individual, “We don’t even know what criteria they are using to give out the money. It’s a huge mystery story.” One district leader described their county office as running a budget surplus with their SELPA, yet the county has hired the district’s special education teachers away from the district, given them raises, and then passed the increased cost onto districts, who themselves struggle to keep special education costs in the black.

Meeting participants further emphasized that addressing a flawed system will not, by itself, fix something that is not fully funded to begin with. Districts regularly pay for special education services out of their general fund because state dollars are insufficient to cover the overall expense. As is the case with general education funding, the state needs to confront issues of adequacy in special education funding.

### ***Addressing Capacity Needs***

Even if the state were to resolve funding challenges, statewide capacity needs remain. A shortage of specialized teachers, including psychologists and health specialists, makes it difficult for districts to deploy individuals with the knowledge and skills needed to bring MTSS to life. These capacity deficits are likely to emerge when county offices perform root cause analyses with districts based on their California school dashboard results, yet the counties may lack expertise in areas like UDL that can be fundamental components of a strategy to address student needs. Indeed, a stronger understanding of what MTSS is and entails may be a prerequisite for building capacity from a state perspective.

### ***Considering the Statewide System of Support***

Panelists and other meeting participants also discussed the implications of discussions about MTSS for the new statewide system of support. Most districts identified in fall 2017 to receive differentiated assistance were identified because of special education student performance. This is the first time that administrators have gone through the root-cause analysis process as part of the state system, and consequently, consistency is a major



challenge. One meeting participant reported that county superintendents planned to come together to reflect on what they have learned this year, and the Orange County Office of Education has been facilitating MTSS trainings, yet comments during the meeting suggested that these approaches may be insufficient.

Multiple panelists argued that supporting MTSS from a state level through the statewide system of support requires an expanded focus on UDL. Indeed, the state's special education task force recommended that both MTSS and UDL serve as cornerstones of a system that supports students with disabilities. Resources and guidance from the state about UDL have been comparatively sparse relative to the work around MTSS. As one Sanger district leader reflected, "I do think something that has been missing from the larger MTSS conversation and training is UDL. For us it's a cornerstone of the structure. That deep understanding of UDL that would have been part of the conversation around MTSS has been missing.... If [UDL] is missing, [MTSS] is not going to take off." Another meeting participant suggested that an expanded focus on UDL can help shift a conversation about the statewide system of support that has focused almost exclusively on Tier 2 interventions: "UDL puts the focus back on the appropriate level, which is Tier 1."

### ***Advising Incoming Policymakers***

Panelists closed their remarks by offering some words of advice to incoming policymakers whom Californians will vote into office in November 2018. First and foremost, panelists advised new policy actors to stay the course. The California education landscape has seen dramatic changes in recent years, and although many details remain to refine, those changes have been positive. Newly elected and appointed officials should follow the momentum as they continue to improve the state education system. In addition, one panelist pointed to the upcoming release of the new Getting Down to Facts studies<sup>5</sup>. The results of these studies should help clarify areas of strength and need in the state and can inform the next steps forward.

### **Next Steps for the Collaborative**

The location, date, and topic of the next Collaborative meeting have yet to be determined. Collaborative staff will communicate with district leaders to help create a calendar for the upcoming year so that members can attend. In the meantime, the Collaborative staff will continue to pursue publications and activities that share key lessons from our core meetings with the broader field of California educators. As always, resources from this and previous meetings, updates regarding Collaborative members, and information concerning upcoming events are available on our website at [www.cacollaborative.org](http://www.cacollaborative.org).

---

<sup>5</sup> In 2007, a set of more than 20 studies collectively known as Getting Down to Facts examined California's school finance and governance systems. A new set of studies to be released in 2018, Getting Down to Facts II, will again explore key issues related to public education in California. For an update on the content and progress of Getting Down to Facts II, see this February 2018 EdSource article: <https://edsources.org/2018/california-research-project-timed-to-elevate-education-in-fall-elections-inform-next-governor/>